

School Facility Program

# Assembly Bill 16 – Joint Use

Office of Public School Construction  
October 2002 – Workshop

# Introduction

Proposition 47 provides for:

- \$50 Million to be apportioned July 2003

The Kindergarten-University Public Education Facilities Bond Act of 2004 provides for:

- \$50 Million to be apportioned in July 2004 or July 2005

# Topics of Discussion

- Overview-3 Types
- Part of a New Construction Application
- Project and Square Footage Eligibility
- Grant Determinations
- Ineligible Project Costs
- Priority Order of Projects
- Joint Use Partner Responsibilities
- Time Limit on Apportionment
- Application Submittal Dates
- Application Process

# Types of Joint Use Projects

- AB 16 Joint Use provides for three types of Joint Use projects, referred to as:
  - Type I
  - Type II
  - Type III

# Type I

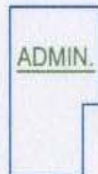
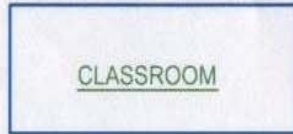
- Part of a new construction project with a grade K-12/higher education collaborative effort project to:
  - Improve pupil academic achievement
  - Provide teacher education
  - Provide childcare facilities

# Type II

- Part of a new construction project that will increase the size, create extra cost, or does both beyond that necessary for school use, of the:
  - Multipurpose room
  - Gymnasium
  - Library
  - Childcare Facility

Y STREET

JOINT USE INCREASED  
SQUARE FOOT

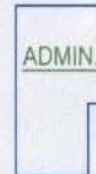
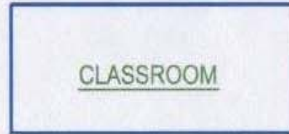
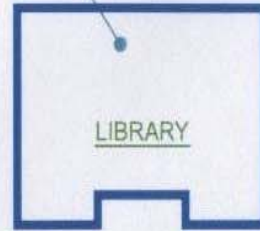


Z STREET

INCREASED SIZE

Y STREET

EXTRA \$ COST

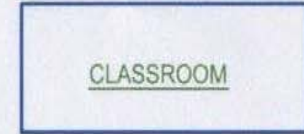
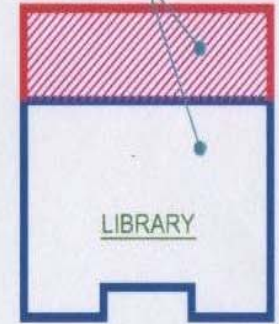


Z STREET

EXTRA COST

Y STREET

JOINT USE INCREASED SQUARE FOOT  
AND EXTRA \$ COST



Z STREET

INCREASED SIZE &  
EXTRA COST

TYPE II JOINT USE TYPICAL SITE PLAN

SCALE : NONE



# Type III

- Stand alone project located at a school that does not have the type of facility or the existing facility is inadequate; that improves pupil academic achievement or provides teacher education; or is a:
  - Multipurpose room
  - Gymnasium
  - Library
  - Childcare Facility



# Types I and II

## Part of a New Construction Application

Means one of three things:

- New Construction Application and Joint Use application are submitted concurrently
- New Construction Application previously submitted but not yet funded and the Joint Use Project was not included in the plans
- New Construction Application previously submitted, funded or unfunded, and the Joint Use Project **was** included in the plans and Construction contract executed after 4/29/02

# Project Eligibility

## Required of all 3 Types:

- Contract executed after April 29, 2002
- Approvable Joint Use Agreement
- Project has Square Footage Eligibility (except Type II- Extra Cost)
- Projects have a maximum cap of:
  - \$1 million for elementary
  - \$1.5 million for middle
  - \$2 million for high

# Type I Project Eligibility

- Part of a New Construction Application
- Joint Use Partner is Higher Education
- The facility is located at the school site of the SFP project
- Project does one of three things:
  - Improves Pupil Academic Achievement
  - Provides Teacher Education
  - Provides Childcare facilities
- DSA approval of Plans
- CDE approval of Plans

# CHART OF SQUARE FOOTAGES

## (In Square Feet)

<b>T y p e I</b>	<b>T y p e I I</b>	<b>T y p e I I I</b>	<b>Facility Type</b>	<b>Elementary School K-6, K-8</b>	<b>Middle School 7-8 or 6-8 (on Separate Campus)</b>	<b>High School 7-12 or 9-12 (on Separate Campus)</b>
	x	x	Multi-purpose Room (includes food service)	5.3 per pupil Minimum 4,000	5.3 per pupil Minimum 5,000	6.3 per pupil Minimum 8,200
	x	x	Gymnasium (includes shower/locker)	12.9 per pupil* Minimum 6,828* Maximum 16,000*	12.9 per pupil Minimum 6,828 Maximum 16,000	15.3 per pupil Minimum 8,380 Maximum 18,000
	x	x	Library	2.3 per pupil plus 600	3.3 per pupil plus 600	4.3 per pupil plus 600
x		x	Teacher Education or Pupil Academic Achievement**	39 per pupil or as approved by CDE		
x	x	x	Childcare	60 per child - Minimum 1,440		

\* Available only if there is no multipurpose room or the existing multipurpose room is inadequate on the campus and the Joint-Use Agreement includes gymnasium space rather than a multipurpose room.

\*\* Subject to the CDE approval.

Regulation Section 1859.124.1

# Type I Square Footage Eligibility

Square Footage =  
sf in Chart of Square Footages,

Example:

Elementary Childcare Facility has 30 kids.

$60 \text{ sf} \times 30 = 1800 \text{ sf of eligibility}$

# Type I Grant Determination

Total of:

- \$173.30 for Toilet Facilities
- \$96.30 for Other Facilities
- 50% Applicable Site Development Costs
- 50% Applicable Excessive Cost Hardship Allowances

# Type II Project Eligibility

- The Joint Use Partner is a:
  - Governmental Agency
  - Higher Education, or
  - Nonprofit Organization
- Project increases the size, creates Extra cost, or does both of the:
  - multipurpose room
  - library
  - gymnasium
  - or childcare facility

# Type II Project Eligibility

- Part of a new construction application
- The facility is located at the school site of the SFP project
- DSA Approval of Plans
- CDE Approval of Plans



# Type II Square Footage Eligibility

## For Increased Size

- Total Square Footage of Facility  
*minus*
- Square Footage Entitlement from Chart of Square Footages
- Difference is Square Footage Eligibility

### **Example:**

Plans = 10,000 sf;  
Chart = 6,000 sf

Eligibility for increased  
size = 4,000 sf

# Type II Grant Determination

## For Increased Size

- Divide eligible sf by total sf
- Multiply this amount by:
  - toilet sf and by \$173.30
  - other sf and by \$96.30
- 50% Applicable Site Development
- 50% Applicable Excessive Costs

# Type II Grant Determination

## For Extra Cost

- Take the architect's cost estimate to construct the facility
- Subtract the SFP eligible costs to build the facility
- Difference is the Extra Cost

# Type II Grant Determination

## For Extra Cost Further Defined

Total of:

- 50 % of the Construction Cost of the whole facility
- 50% of the Applicable Service Site Development

*minus*

\$173.30 for Toilet Area

\$96.30 for Other Area

# Type II Grant Determination

## Increased Size *and* Extra Cost

- Take the architect's cost estimate to construct the facility
- Subtract the SFP eligible costs to build the MEF facility
- The Difference is the Increased Size and Extra Cost
- Add any applicable Site Development costs

# Type III Project Eligibility

- Facility does one of the following:
  1. Improves Academic Achievement
  2. Provides Teacher Education
  3. It's a multipurpose room, gym, library or childcare facility
- Joint Use Partner is Higher Education for 1 and 2.
- Joint Use Partner is a governmental agency, Higher Education, or a Nonprofit Organization for 3.

# Type III Project Eligibility

- School does not have the type of facility or it's Inadequate
- Facility will be located at a public school site
- Preliminary Plans complete
- CDE approval of Preliminary Plans

# Type III Project Eligibility

## Determining if a Facility is Inadequate

- Multiply the sf eligibility from the entitlement in the chart of eligible square footage by 60%.
- Any existing facility must be less than that amount to have eligibility.



# Type III Square Footage Eligibility

## Example:

Chart says entitlement is 10,000 sf

Existing facility is 2,000 sf

$$10,000 \times 60\% = 6,000$$

2,000 sf < 6,000 so sf eligibility is 10,000 sf

Square footage eligibility is the amount in the Chart of Square Footages

# Type III Grant Determination

Total of:

- \$173.30 for Toilet Facilities
- \$96.30 for Other Facilities
- 50% Applicable site development costs
- 50 % Applicable Excessive costs
- Applicable Project Assistance

# Type I and III Grant Determination

## Area Beyond Eligible Square Footage

- Divide eligible sf (from chart) by total sf
- Multiply this amount by:
  - toilet sf and by \$173.30
  - other sf and by \$96.30
- 50% Applicable Site Development
- 50% Applicable Excessive Costs
- Project Assistance (Type III only)

# Ineligible Project Costs

- Site Acquisition
- Off-Site Development
- Service Site and Utilities in Type I and II that are applicable to the new construction application

# Funding Priority Order

- Type I funded first
- Type II funded second
- Type III funded last

# Joint Use Partner

## Financial Contribution

- 50% of Eligible Project Costs
- Multiple Joint Use Partners
- Additional Financial Contributions

# Joint Use Partner



## Joint Use Agreement must specify:

- The Shared Responsibility for funding of the project
- The Shared Responsibility for funding of operational costs
- The responsibility for operating and staffing
- How the safety of the pupils is ensured
- The facility is used to the greatest possible degree

Education Code Section 17077.42

# Time Limit on Apportionment

Type I and II:

Subject to current SFP Timelines

Type III:

One year for final DSA plans

Then subject to current SFP Timelines



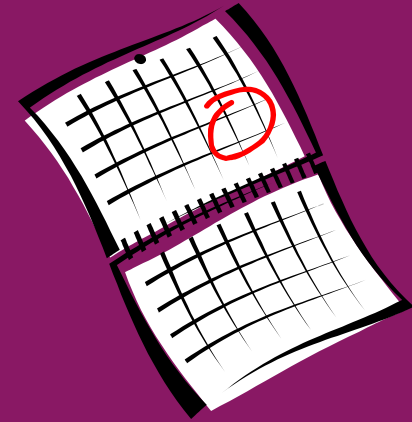
# Application Submittal Dates

## First funding cycle:

- November 5, 2002 – May 31, 2003

## Second funding cycle:

- June 1, 2003 – May 31, 2004



# Submittal of Application

- SAB Form 50-07
- Joint Use Agreement
- DSA Plans (Type I & II)
- Preliminary Plans (Type III)
- CDE Plan approval letter
- Cost estimate – Site Development
- Cost estimate facility – Type II Extra Cost

# Questions...